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This document is intended as a guide for any group of persons wishing to establish an Institute of Lifetime Learning in their community. It includes details on the role of the organization, the initial tasks to be done in starting a branch, the job of the program coordinator, minimum and desirable facilities, course content and goals, type of instructors needed, promotion and publicity, and budget and costs. It is recommended that the program coordinator be a volunteer or part-time employee who hires and supervises the qualified instructors the institute employs, and who provides all the supplies needed for the institute or its instructors. Courses should be academically oriented, and the quality of the program should not be sacrificed to save funds. All communications media should be used to advertise the program. (The minimum requirements for starting a branch and the local charter are included). (nl)

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FORMULA FOR SUCCESS

A STEP-BY STEP PROCEDURE FOR ORGANIZING
A LOCAL INSTITUTE OF LIFETIME LEARNING

AC 004 060

A Service of | NATIONAL RETIRED TEACHERS ASSOCIATION
AMERICAN ASSOCIATION OF RETIRED PERSONS

The Institute of Lifetime Learning

1968

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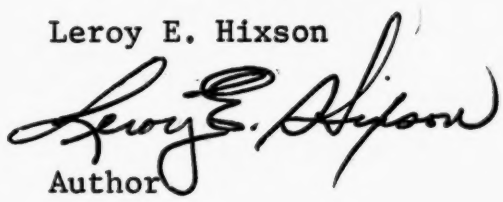
PREFACE

This document is intended to serve as a guide to any Chapter, Committee, or group of persons desiring to establish an Institute of Lifetime Learning in their own community.

It should be emphasized that the steps described herein are not equally applicable to all communities. Communities are of different sizes, capacity, and resources, therefore these suggested steps need to be considered in light of the particular community interested. On one hand, the basic steps are sound, and any shortcut can either cheapen the program or impair its long range success. The "image" of the Institute of Lifetime Learning in your community should be one of the highest quality and standard. To be less than that is not worthy of your time or effort.

Most often we tend to underestimate the capacity of our resources, our community, or our members. Nothing good or worthwhile was ever accomplished without effort or the dedication of someone or some group of people. To these people this guide book is dedicated.

Leroy E. Hixson



August, 1968 Author

" A FORMULA FOR SUCCESS "

A Step-By-Step Procedure for Organizing
a Local Institute of Lifetime Learning

WHAT IS THE INSTITUTE OF LIFETIME LEARNING?

It is a copyrighted, nonprofit, nonpolitical school for continuing education for members of the National Retired Teachers Association and the American Association of Retired Persons. It is intended to provide academic instruction in a regularly scheduled curriculum including subjects relating to music, literature, arts, science, handicrafts, world affairs, and commerce, by a regular faculty, for a regularly enrolled body of students. It is intended to provide instruction and guidance in the area of retirement living for retired or older persons in all walks of life. It is intended to be neither a university nor a school nor a college; but a little of all three. It is intended to use all forms of communicating media such as lectures, seminars, forums, discussions, workshops, radio, television, etc. Finally, it is intended to be less formal, less competitive, less demanding, yet more interesting, more appealing, and more particularly adapted to the needs of the older person.

GETTING STARTED

1. A local AARP Chapter or RTA Group should officially adopt a resolution of intent to start and support an Institute of Lifetime Learning in their respective area. Copies of such a resolution should be sent to national headquarters Institute of Lifetime Learning either in Washington or Long Beach, whichever is most convenient.

2. A local Institute Committee should then be established. Such a committee should be composed of not less than three people. Seven is a recommended number for a good committee for this purpose.

3. The local committee is charged with the responsibility of guiding the development of their local Institute of Lifetime Learning. They create and adopt whatever policy decisions are necessary for their local Institute taking care that at no time are such policy decisions in conflict with national policy. The local Committee is responsible for seeing that their local Institute meets the "Minimum Standards" provided by the national headquarters.

4. The local committee should then <u>determine</u>:

a. where their Institute will be conducted

b. what courses will be offered

c. when they will be conducted

d. what fees will be charged

e. adopt an expense budget

f. select a "Program Coordinator"

THE PROGRAM COORDINATOR

1. One person should be selected to be the administrative officer for the Institute and the local Institute committee. Such person may be a volunteer or a part-time employee. Such person may be recruited especially for this purpose from:

a. the RTA-AARP membership

b. local adult education institutions

c. current adult education administrators

Such person should be secured on a part-time basis. It is recommended that such person be employed even if at only a small honorarium. Such person should

ADDENDUM

GETTING STARTED

(Paragraph 2, Page 2)

. . . In some communities it may be desirable to include on this committee representatives from other organizations both public and private. Where this is desirable two suggestions should be considered:

a. the Chairman of the Institute Committee should always be a member of the local AARP or RTA Chapter.

b. other organization representatives should be invited to serve by the Institute Committee Chairman, not just sent at the discretion of the other organization.

be paid at least as much as an instructor, thus enabling the local Committee to expect a more specific amount of time and effort in administering the program. All arrangements made in securing a Program Coordinator should be confirmed with a letter to the individual and a copy to the national Institute headquarters.

2. The Program Coordinator should employ qualified instructors at a salary commensurate with the rate of pay for adult education instructors in your area.

3. The Program Coordinator should supervise all instructors in terms of their reliability, punctuality, whatever paper work may be required, and the content of the courses being taught.

4. The Program Coordinator should handle all administrative details of collecting and disbursing tuition and other funds of the Institute and properly accounting for them in accord with the adopted expense budget and good business practice.

5. The Coordinator should keep complete records of enrollment, attendance, and any other statistics as may be required by the local Committee. He should make regular reports to the Committee with copies to the national Institute headquarters.

6. The Coordinator should prepare and distribute all types of promotional material, announcements, or advertising materials needed within the budget limits.

7. The Coordinator is responsible for the replacement or dismissal of any instructor or other employee if necessary for any reason.

8. The Coordinator is responsible for the care and maintenance of whatever facilities are used by the Institute employing assistance if necessary

and within budget limits.

9. The Coordinator is responsible for securing any and all supplies needed for the Institute or its instructors. This would be such things as pencils, chalk, paper, ditto or mimeographed materials, text books, etc. Some such supplies could be provided by the Institute or be purchased individually by the Student.

FACILITIES

1. It is recommended that when starting an Institute, classes should be planned on a one-day-a-week basis, either morning or afternoon or both depending on local resources. Securing facilities should be based on this recommendation. As a program grows and is successful, it can later be expanded as desired.

2. Minimum facilities needed would be rooms in which classes could meet. The number would depend on the number of courses to be offered and when. It is recommended that three rooms would permit starting with three courses simultaneously. Additional courses could be offered in the same rooms at different hours. The registration or enrollment process could be done from a table in a hall. If only one classroom can be secured, classes can be scheduled in it in succession. Be sure to allow at least one half hour between classes.

3. Classrooms should preferably be with tables and chairs not in excess of 20 capacity. The rooms should be well lighted and well ventilated. They should be pleasant in appearance. Where possible they should look more like lounges than classrooms. This is an important feature of any adult education program adapted to older persons. Where carpet is on the floor, the edges should be taped to the floor to prevent tripping. The rooms should

be free of other possible hazzards with fire exits well marked.

4. Classrooms should be easily accessible either on the main floor or by the elevator. They should be easily identifiable, and not too far from the entrance.

5. Possible sources of such facilities should include:

Churches

Y.M.C.A.'s or Y.W.C.A.'s

Jewish Community Centers

Neighborhood Houses

Business institutions with Community Rooms such as Banks, Savings and Loan Institutions, Insurance Companies, etc.

Student Unions

Faculty Clubs

Community Centers

The use of school or university facilities has been omitted from the above list because the typical classroom, if available under the Community Center Act, is usually not conducive to the best Institute experience for older people. There may be some exceptions to this.

6. Facilities should be located as near the geographic center of the area to be served, but with particular regard to the availability of transportation both public and private. There should be good public transportation available to the location and/or adequate parking space available for private transportation.

7. Where facilities are secured on a rent-free basis, if funds permit, a monthly financial contribution toward heat, light and maintenance will more likely add to a more pleasant and lasting relationship.

8. Facilities should be sought in a reputable section of the community to be served, and in a reputable organization inasmuch as the identification of the organization providing the facilities will inevitably be identified with the Institute.

COURSE OF INSTRUCTION

1. It is recommended that an Institute start with an offering of at least six courses with the very careful stipulation that such courses be held only if there is a minimum enrollment of at least ten persons.

2. In selecting which courses should be offered, care should be taken that the Institute operates within its stated purpose and function as outlined at the beginning of this document. The Institute as seen by its founder, Dr. Ethel Percy Andrus, was to be an instrument to extend the "learning horizons" of older people. It was conceived of in the academic sense rather than the recreational sense. Therefore, recreational programs should be left to RTA Groups and AARP Chapters or other organizations to conduct. While some courses the Institute might conduct may come close to being recreational activities, they can be justified only where the central purpose is to teach or learn, with progression measured in those terms as opposed to only recreation. While adult education can, in a broad sense, be interpreted as recreational, the Institute of Lifetime Learning distinquishes itself by addressing itself to the more academic approach, yet keeping the informal qualities most attractive to the older person.

3. The selection of courses to be offered should be based on the interests and needs of the older person. So far, the experience has tended toward the Arts and Crafts, the Humanities, the Social Sciences, with some of the

Biological Sciences. Suggested areas in which courses might be offered include the following:

Oil Painting	Psychology
Water Color Painting	Personal Development
Drawing	Ceramics
Creative Writing	World Affairs
Languages	Real Estate
Contemporary American Literature	Speed Reading
Drama Reading	Skill Courses (Sewing, Knitting, etc.)
Appreciation Courses (Art, Music, etc.)	Shakespeare
Philosophy	Religion
Consumer Concerns	Financial Planning
Defensive Driving	Probate Law

Courses requiring equipment such as do many of the arts and crafts should not be considered unless special facilities are available.

INSTRUCTORS

1. The reputation of the Institute in the long run will depend on the quality of its instructors. Therefore, every effort should be made to secure the best. It is short-sighted to do the expedient.

2. Instructors should generally be chosen on the following qualifications:

   a. ability to teach and appreciate older adults

   b. knowledge of the subject matter

c. academic achievement as measured by degree achieved - M.A., Ph.D.

d. experience in the field of the subject

e. reputation in the field of the subject

Any combination of these qualifications or all of them should be considered.

3. Instructors may or may not be currently teaching in some other educational institution.

4. Possible sources of instructors:

a. local RTA Groups

b. local Universities, Colleges or Junior Colleges

c. local high school Districts

d. local adult education programs

e. local business leaders

f. local leaders with acknowledged experience in a specific field

5. The appointment of any and all instructors, volunteer or part-time paid, should be confirmed in writing in which all conditions and terms are clearly stated in advance of their actual teaching. Without a doubt, the best experience has come from paid instructors who are paid at the current rate for adult education in your area. A "cheap" program is less likely to succeed.

6. Instructors should be advised of the unique teaching features of the Institute of Lifetime Learning:

a. an eight or ten week course of instruction

b. no homework to be assigned, although it may be recommended

c. no examinations are to be given

d. the informal, seminar approach is recommended where applicable

e. progress is paced to the student abilities rather than curriculum goals

PROMOTION AND PUBLICITY

1. Once a local Committee is organized, a Program Coordinator is designated, courses selected, facilities secured, and instructors selected, the next most important item is to let the people know about it. This is a responsibility of the Program Coordinator with the assistance of the local Committee and the local Chapter members.

2. All communications media should be used to the extent budget limitation will permit. These include:

a. local newspaper

b. local radio and television

c. mimeographed or printed literature

d. written and verbal announcements before groups of older persons in churches, community centers, chapters, etc.

e. bulletin board announcements or posters

3. Stress the quality of the instructors and the fact that this Institute is especially designed for persons over 55 years of age. Stress all the points that make this program unique and different.

4. Be sure to stress how, why, when, and where a person can get into this program.

5. Make clear a policy of cash deposit for registration with no refunds. People will generally accept such a policy if advised in advance. It is nec-

essary for you to keep your committments to the cost of publicity materials or instructors.

6. Be sure all publicity, verbal or written, clearly identifies this program as the Institute of Lifetime Learning under the sponsorship of NRTA-AARP. Where it is jointly sponsored by another organization, that organization should also be identified. Written permission to use the name "Institute of Lifetime Learning" and its insignia should first be obtained from the national headquarters.

BUDGET AND COSTS

1. The local Committee will have to determine early what it is able to finance in terms of the kind of an Institute it hopes to establish. Care should be taken not to "cheapen the program" by trying too many short cuts. It is better not to start than to start and fail. Generally, people will pay for quality where quality is provided and there is a felt need.

2. There are no direct funds available for local Chapters from the national headquarters. The national headquarters, on the other hand, will fiance professional counsel and guidance on request both by correspondence and by personal visitation.

3. The cost of a local Institute will vary depending on local interest and conditions. It is recommended, however, that regardless of how small or how large a program is undertaken a written budget should be adopted at the beginning.

4. The following sample minimum budgets are based on different assumptions. These, or any combination of them, may be appropriate for the local conditions:

PLAN I

Based on three courses offered one hour per week for ten weeks in donated facilities with no subsidy and students providing all their own materials.

Income	
Tuition	$360.00
(30 students @ $12.00 ea.)	
Total	$360.00

Expense	
Salaries - Coordinator	50.00
Salaries - Instructors (3 @ $5.00 per hour)	150.00
Publicity & Promotion	75.00
Miscellaneous (Honorarium for the Custodian, parking fees, telephone, etc.)	50.00
Insurance (liability)	25.00
F.I.C.A.	10.00
Total	$360.00

PLAN II

Based on three courses offered one hour per week for ten weeks in rented facilities with a small subsidy, higher instructor pay, and students providing all their own materials.

Income	
Tuition	$450.00
(30 students @ $15.00 ea.)	
Subsidy	335.00
Total	$785.00

Expense

Salaries - Coordinator	80.00
Salaries - Instructors (3 @ $8.00 per hour)	240.00
Publicity & Promotion	75.00
Rent	300.00
Insurance (liability)	25.00
F.I.C.A.	15.00
Miscellaneous (Honorariums, parking, telephone, etc.)	50.00
Total	$785.00

5. Tuition should be charged all students who participate in the program. Experience suggests that tuition generally should not go over $15.00 for ten weeks lest it put the program beyond the reach of those to be served.

6. The larger the volume of students participating, the lower the unit cost becomes. A minimum program for three ten-week semesters per year will require approximately $1,000.00 per year subsidy.

7. The source of subsidy should be well explored within a local community.

a. larger RTA Groups and AARP Chapters may wish to subsidize the Institute from their treasuries, or by increasing their dues, or by a fund-raising project of some kind.

b. survey individuals of financial means in the community. One or more of them may be interested enough in adult education for the older person to provide a tax-deductible gift in support of the Institute.

c. consider a mail canvas to selected lists of older citizens soliciting mail contri-

butions to your Institute fund. This could be handled much like college and university alumni groups do.

d. survey local philanthropic organizations or foundations and interest them in this local project.

e. survey local governmental sources such as the Adult Education Department of local schools and colleges. Some state programs for the aged may be able to assist programs of this type.

EVALUATION

1. Evaluation is important to the success of any Institute. The local Committee and the Program Coordinator should carefully evaluate the program after every semester and report to the local sponsoring RTA Group or AARP Chapter.

2. Evaluation should include making sure that the national "Minimum Standards" are being met.

3. Evaluation should determine the extent and ability of the local Institute to grow at the proper time.

4. Evaluation should determine the needs of the local Institute for assistance from the national staff.

5. Evaluation should determine the extent to which the program is reaching the needs of the local older persons.

THE INSTITUTE OF LIFETIME LEARNING

MINIMUM STANDARDS

1. Written permission for the use of the copyrighted name "Institute of Lifetime Learning" must be obtained from either the Eastern or Western Headquarters of the Institutes in advance of its use.

2. All printed material, mimeographed or other duplication methods, press releases, or other forms of public announcement of the program must identify both the title "Institute of Lifetime Learning" and the fact that it is sponsored by the NRTA and AARP.

3. A responsible committee of not less than three people including a chairman must be designated as the Institute Committee and charged with establishing local policy, selecting a Program Coordinator, and being otherwise responsible for the affairs of the local Institute.

4. Written statements of local policy and actual practice may not be in conflict or contradiction with national policy without expressly written permission from the national headquarters.

5. One person, not a member of the local Institute Committee, must be designated as the Program Coordinator, and be responsible for the administration of the program.

6. Bi-monthly written reports must be sent to the national headquarters showing a financial statement, enrollment, attendance, courses and programs offered,and any other data requested by the national office.

7. The local Institute must:

    a. be limited to adults 55 years of age up.
    b. require membership in either NRTA or AARP.
    c. be conducted in clean, safe and pleasant facilities.
    d. have qualified instructors.
    e. give no exams or required homework.
    f. keep classes small and intimate.
    g. teach at the college or adult level.
    h. be situated with easy access to transportation.
    i. carry liability insurance protecting the local Institute, the National Institute, and the co-sponsoring organization if there is any.

The Institute of Lifetime Learning

LOCAL CHARTER

The Institute of Lifetime Learning of _____

is hereby chartered and authorized to conduct this program to the betterment of mature adults in this community having met all of the following requirements:

1. Written permission has been obtained to use the name, "Institute of Lifetime Learning".
2. Identification of the name has been properly used.
3. A responsible Institute Committee has been established.
4. Local policies are not in conflict with national policies.
5. A responsible Program Coordinator has been named.
6. Appropriate reports have been submitted to the national office.
7. Minimum administrative standards have been met.

For the national headquarters
INSTITUTE OF LIFETIME LEARNING

_____
Dean

Seal

Expires: _____

ERIC Clearinghouse
APR 14 1969
on Adult Education

THE INSTITUTE OF LIFETIME LEARNING
AGE IS TIMELESS

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